



Testimony In Support of Senate Bill 814, An Act Concerning Tax Preparer Liability for Underpaid Income Tax
Finance Revenue & Bonding Committee
February 22, 2023

Dear Senator Fonfara, Representative Horn, Senator Martin, Representative Cheeseman & Distinguished Members of the Finance Revenue & Bonding Committee:

Thank you for the opportunity to provide the following written testimony regarding Senate Bill 814, An Act Concerning Tax Preparer Liability for Underpaid Income Tax.

Since 1955, we at H&R Block have prided ourselves on our work assisting taxpayers with the most important personal financial transaction many will make all year. In Connecticut, H&R Block represents 97 neighborhood offices in Connecticut, 16 of which are independently owned franchises, and at least 759 Connecticut based Tax Pros assisting clients with their tax filings. This gives us a unique vantage point from which to share our perspective on legislation that impact taxpayers and the income tax filing process.

While the details of the legislation are being contemplated and statutory language yet to be drafted, H&R Block is generally supportive of this concept that aims to ensure that all taxpayers in the state of Connecticut have the utmost confidence that they would not be liable for the additional interest and fees levied due to a tax preparer error. Unfortunately, we know that bad actors exist in the tax preparation space, and we support policies that make it more difficult for them to operate in Connecticut and across the nation.

In fact, at H&R Block we take pride in our 100% Accuracy Guarantee policy, which reimburses our clients for any additional penalties and interest levied as the result of an error by an H&R Block tax preparer. This is one of the many protections we offer our clients across our tax preparation products and services.

Legislation to this effect could also serve to assist tax preparers in defining instances that should not be considered 'tax preparer error'. For instance, circumstances where taxpayers may not have provided accurate or complete tax information that affects the accuracy of the return filed, unbeknownst to the preparer.

We appreciate the idea behind the concept put forth by Senator Miller and we look forward to the opportunity to collaborate with her and other co-sponsors should this bill continue moving forward with drafted language.

Sincerely,
Victoria Mayer
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